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Public Sector Blue Light Tech market

Procurement trends and opportunities

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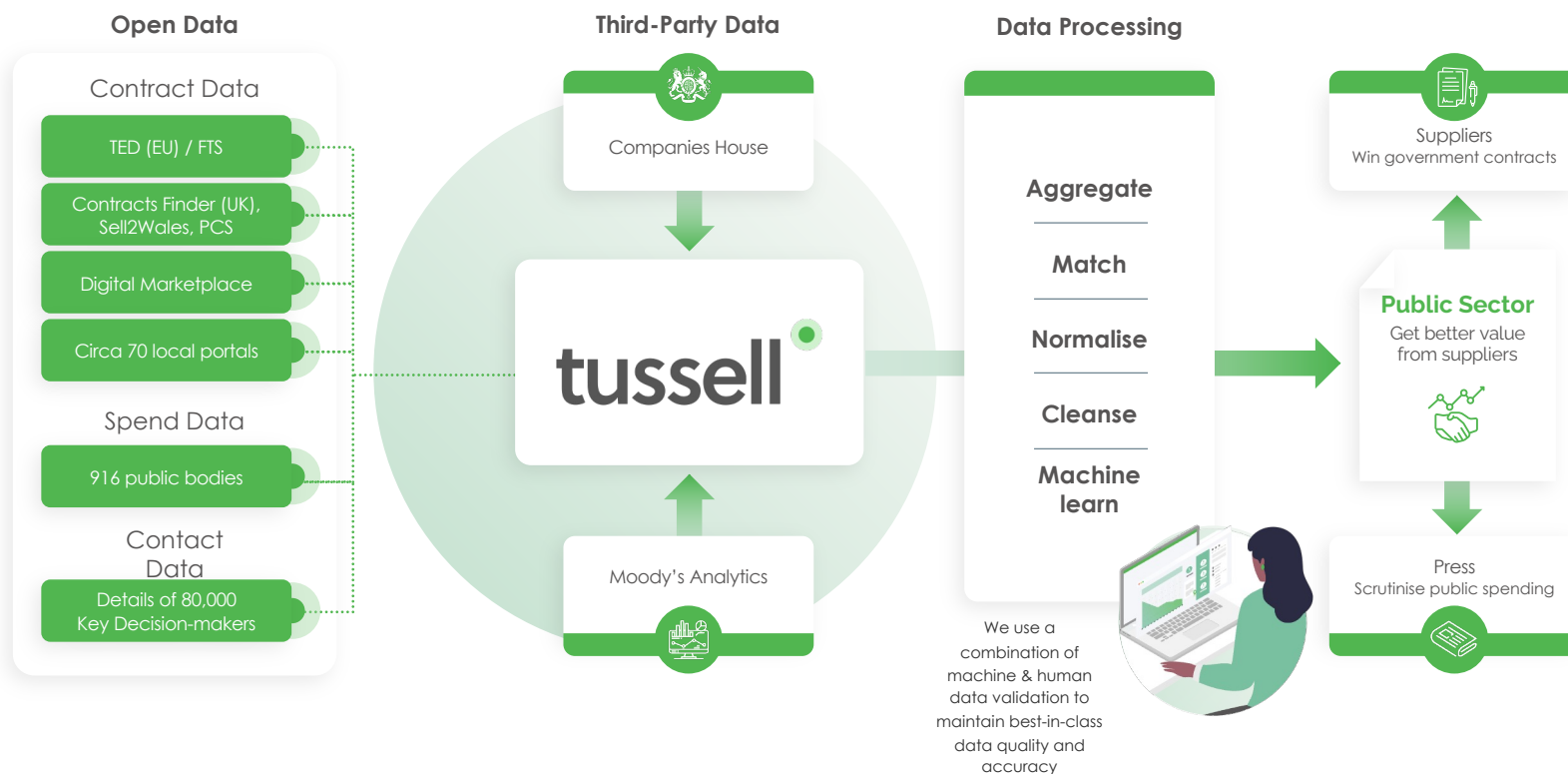
"Serious-minded
business data
provider Tussell"

Matthew Vincent



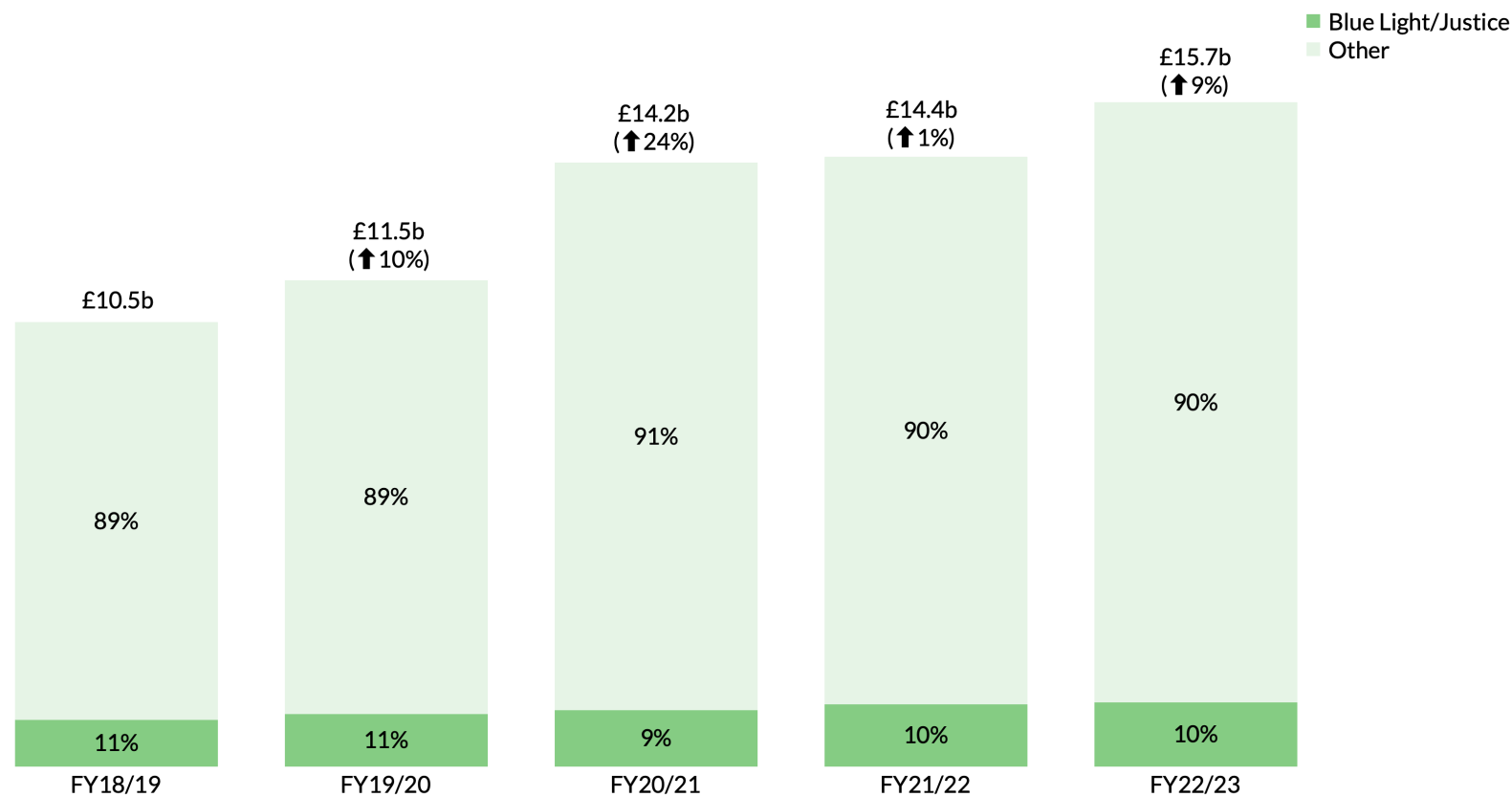
FINANCIAL
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Wider public sector IT spend grew sharply during the pandemic and has carried on growing from that baseline – the new normal

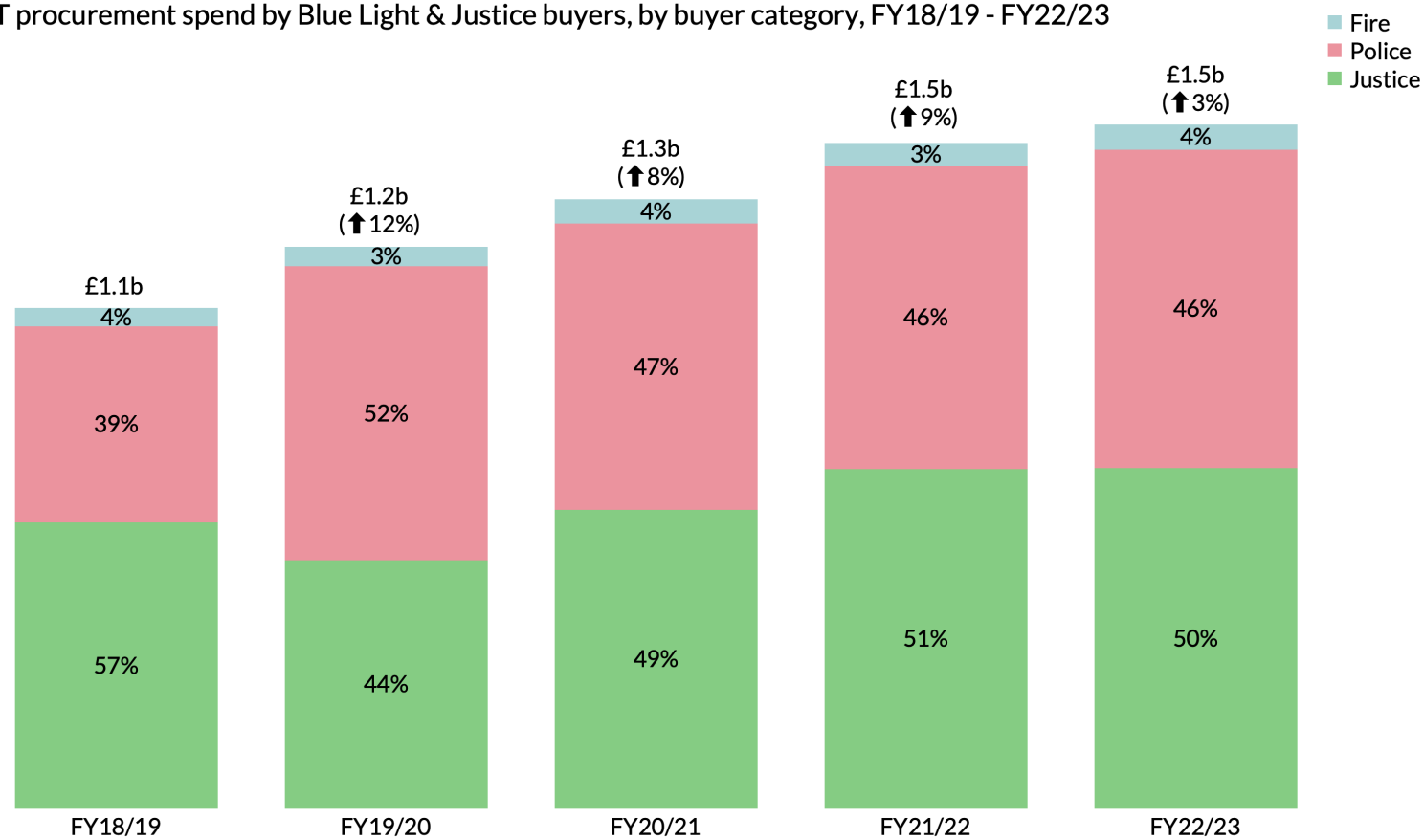
Public Sector IT procurement spend in England, FY18/19 - FY22/23



This report analyses direct procurement spend and contracts, awarded by public sector bodies in England. Blue Light refers to Police and Fire buyers, and Justice refers to the Ministry of Justice, including its arms-length-bodies and executive agencies.

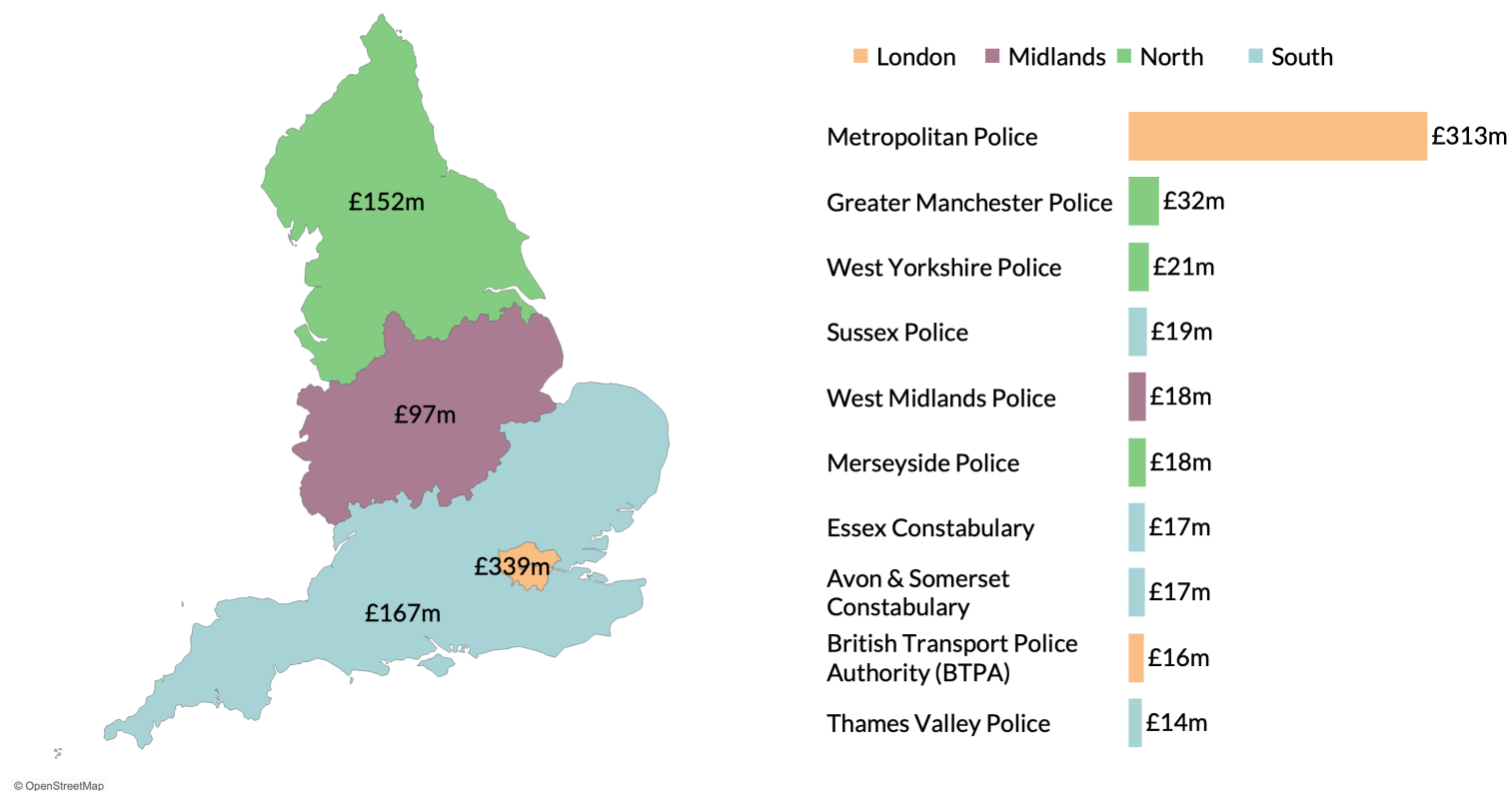
The MOJ accounts for as much IT spend as all Blue Light buyers combined

IT procurement spend by Blue Light & Justice buyers, by buyer category, FY18/19 - FY22/23



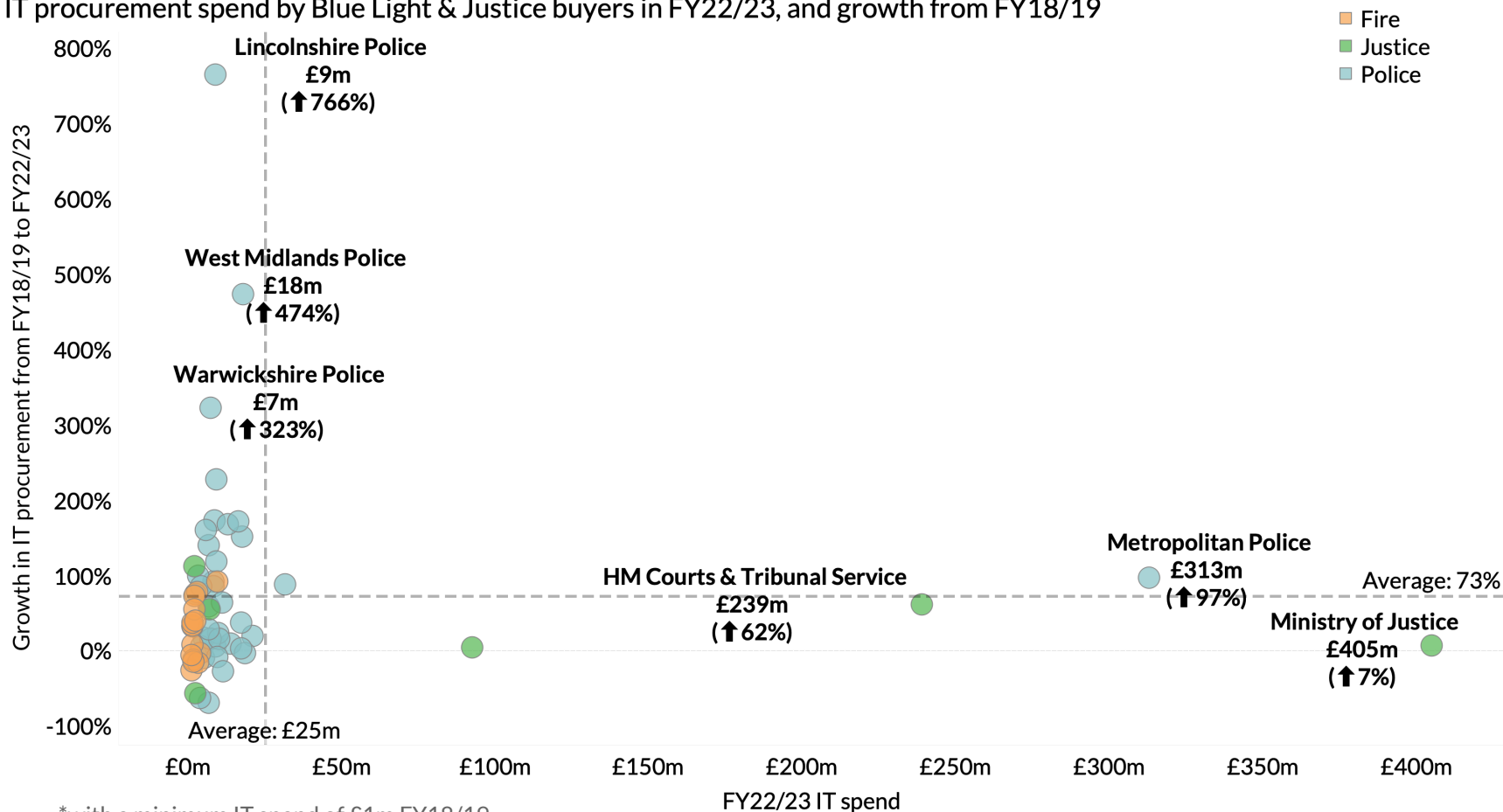
Blue Light buyers in the Midlands are investing less in IT than other areas of England

IT procurement spend by Blue Light buyers, by buyer region, and top 10 Blue Light buyers in England, FY22/23



There is huge variation in IT investment and growth between Justice and Blue Light buyers

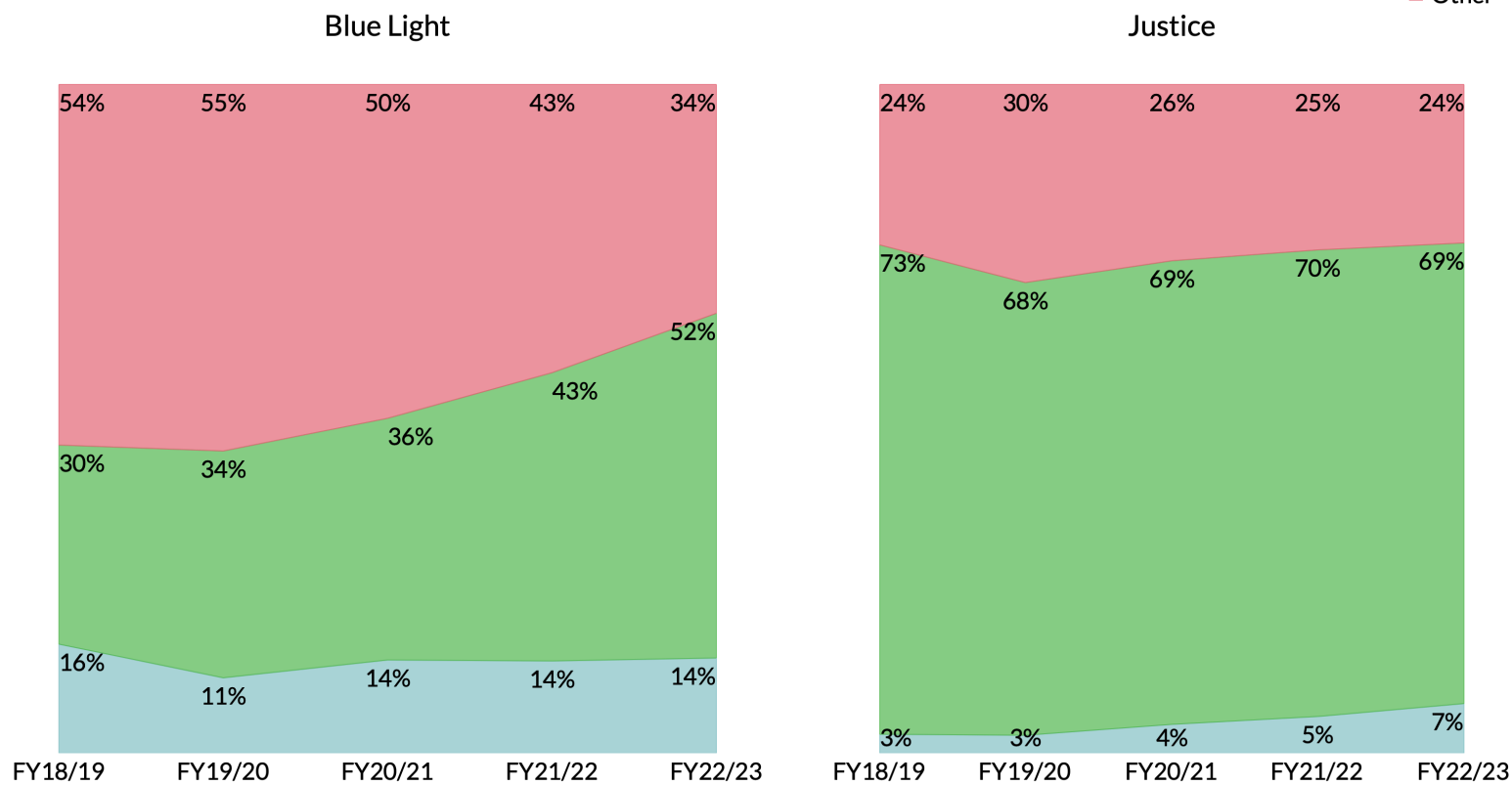
IT procurement spend by Blue Light & Justice buyers in FY22/23, and growth from FY18/19*



Blue Light buyers have a more diverse IT supplier profile than the MOJ

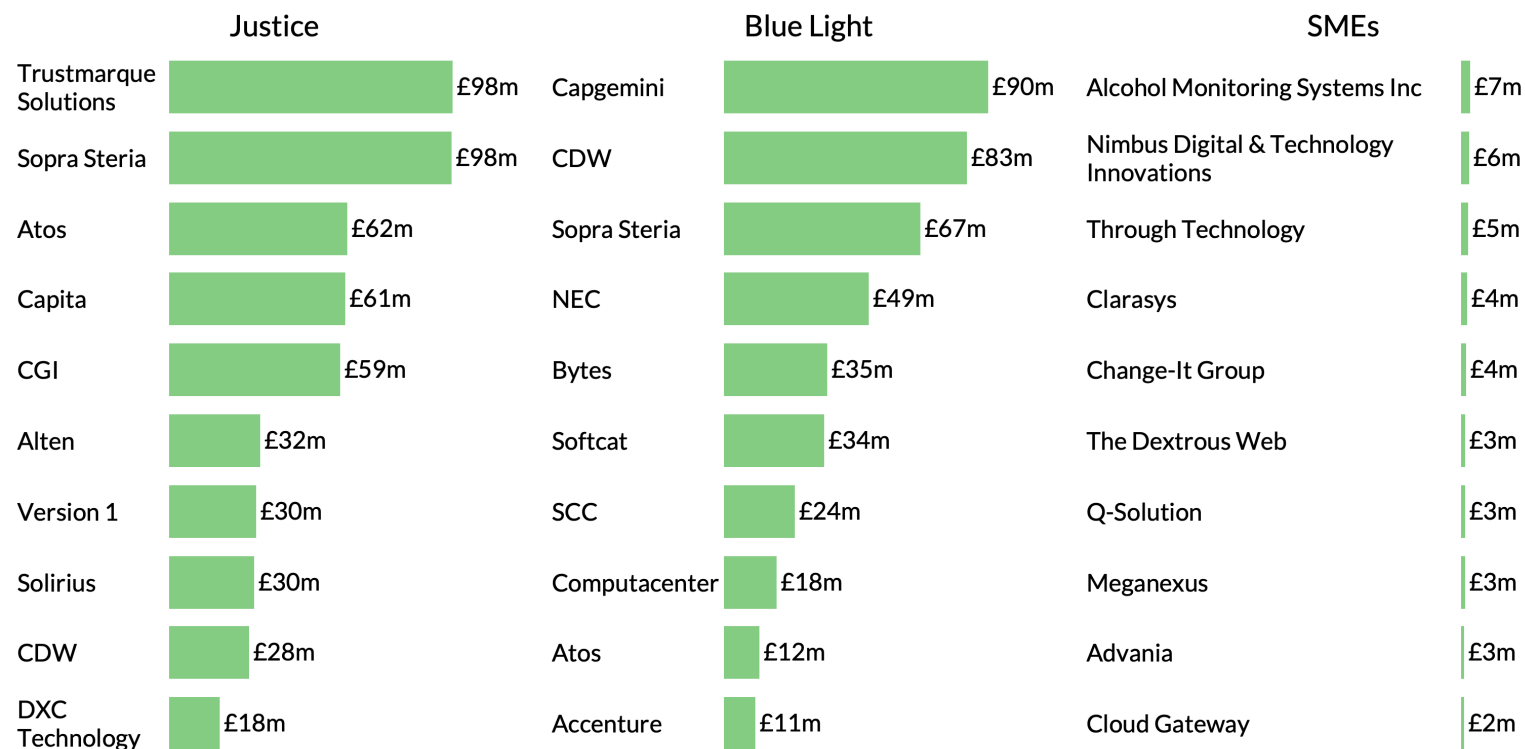
Proportion of IT procurement spend by Blue Light & Justice buyers, by supplier type, FY18/19 - FY22/23

■ SME
■ Top 10
■ Other



Consider partnering with larger suppliers if you're an SME looking to enter this market

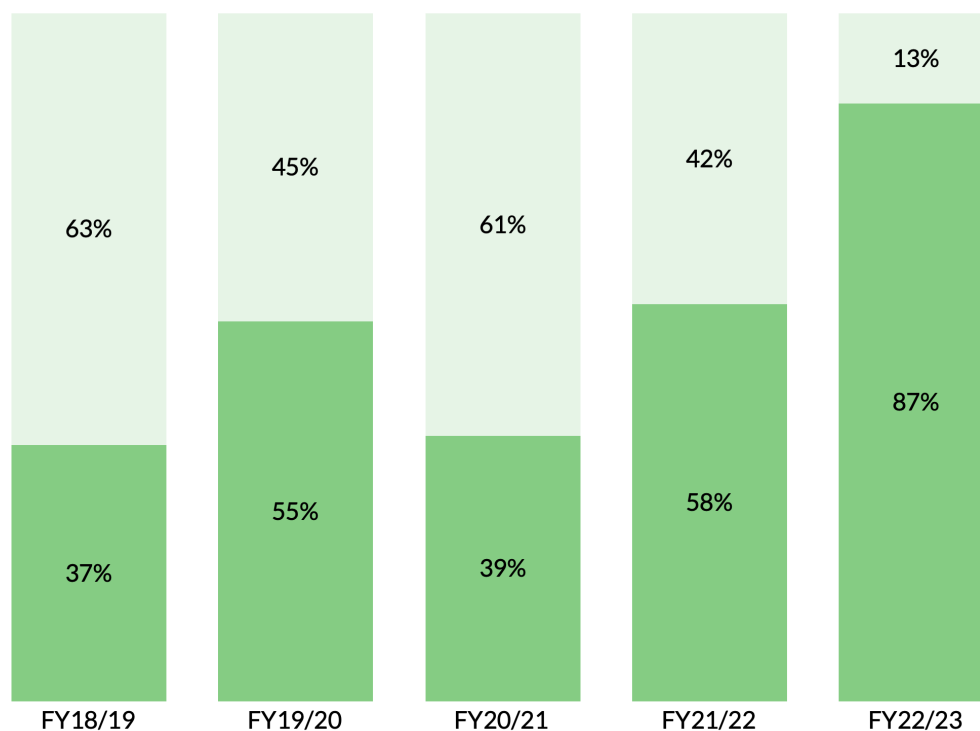
Top 10 IT suppliers for Blue Light & Justice buyers in England, by supplier type, FY22/23



Frameworks are an essential route to market in the Justice and Blue Light IT market

Proportion of IT contract value awarded via a framework by Blue Light & Justice buyers, and their top 5 frameworks by value, FY22/23

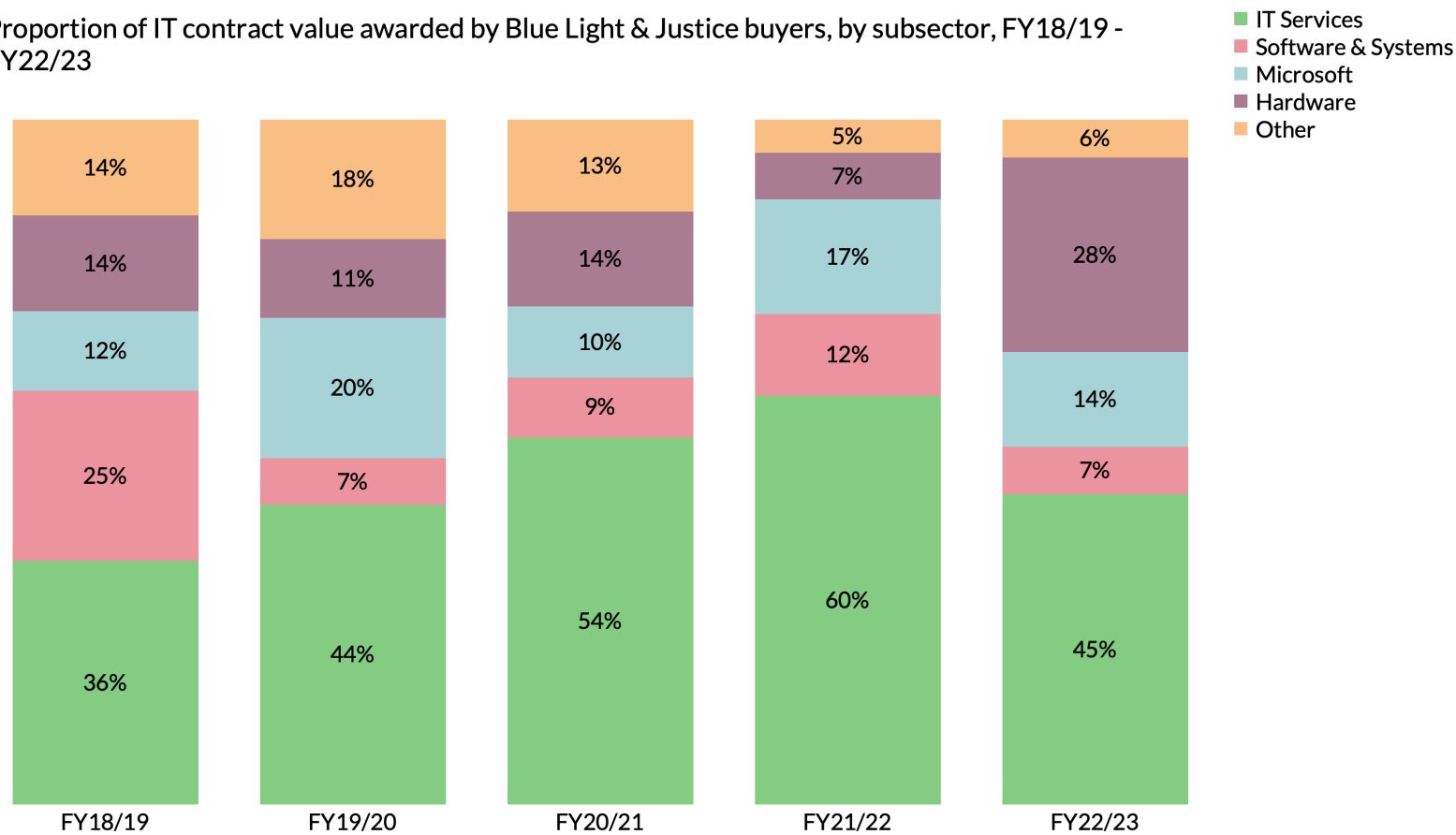
■ Framework/DPS ■ Other



1	G-Cloud	£223m
2	Technology Products and Associated Services	£213m
3	DiTED DPS	£40m
4	RM6263 Digital Specialist and Programmes	£38m
5	Technology Services	£30m

IT Services are the largest Justice and Blue Light sub-sector

Proportion of IT contract value awarded by Blue Light & Justice buyers, by subsector, FY18/19 - FY22/23



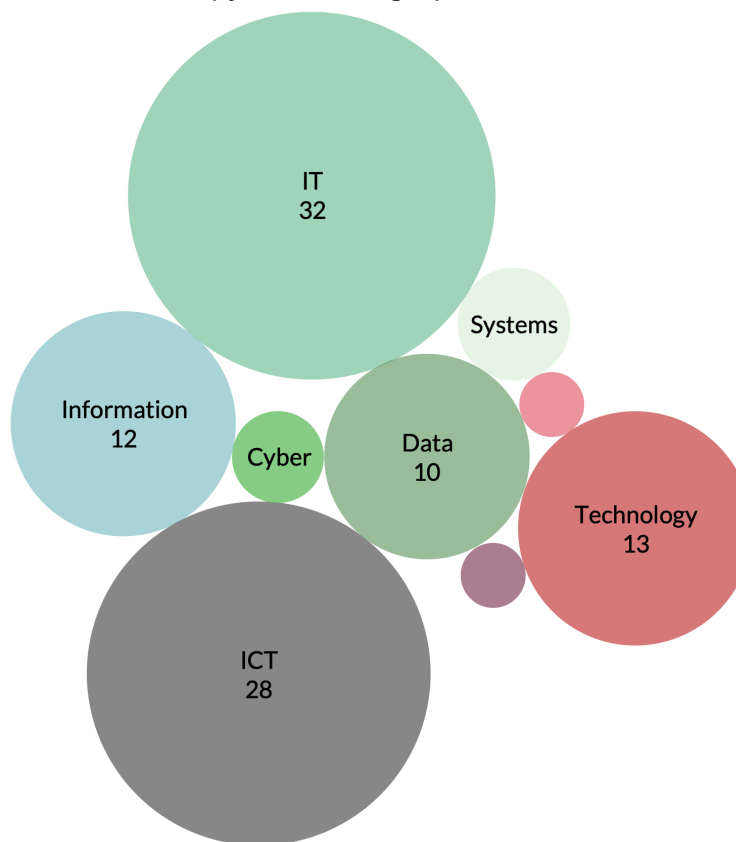
There are almost half a billion pounds worth of Blue Light and Justice IT service contracts coming up for renewal over the next 2 years

Value of live IT service contracts awarded by Blue Light & Justice buyers expiring over the next eight quarters, by subsector

	2024 Q4	2025				2026			Grand Total
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	
IT Services	£18m	£40m	£50m	£84m	£22m	£46m	£61m	£3m	£323m
Hardware	£92k	£5m	£6m	£379k		£24m	£27k	£20m	£55m
Software & Systems	£102k	£11m	£824k	£2m	£3m	£1m	£2m	£17m	£36m
Microsoft	£121k	£10m	£70k	£3m	£963k	£12m	£1m		£27m
Other	£125k	£14m	£264k	£2m	£2m	£3m	£433k	£44k	£22m
Grand Total	£19m	£80m	£57m	£91m	£27m	£86m	£64m	£40m	£464m

Once you've identified a future opportunity, act on it by engaging with over 100 key decision makers in the Justice and Blue Light market

Blue Light & Justice buyer key decision makers, by job title category



tussell

All the data in this
report comes directly
from Tussell's
online market
intelligence platform

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